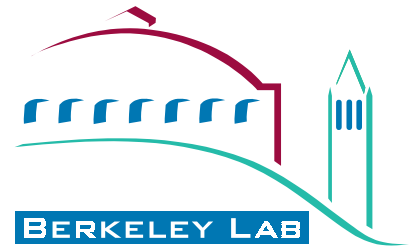
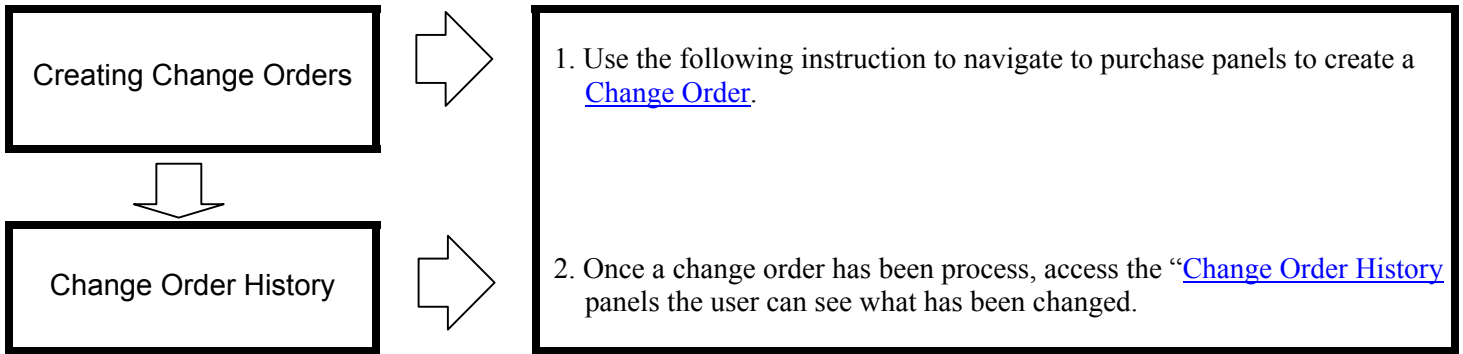


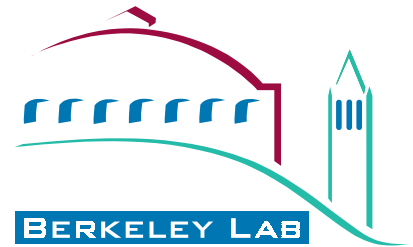
How do I Create a Change Order?



When a it becomes necessary to change a Purchase Order after its been dispatched.



How do I Create a Change Order?



Step 1: Creating Change Orders

PeopleSoft Purchasing for Education and Government Change Order functionality enables you to modify dispatched purchase orders and then re-dispatch your changes to your vendors.

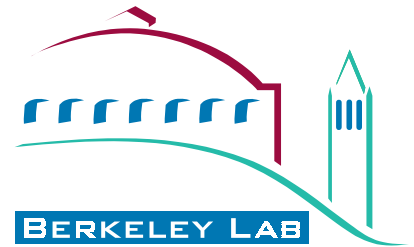
To change a Purchase Order online, you'll use the same panels you use when you update a Purchase Order, except that you will be updating a dispatched Purchase Order, and for this reason, you will be clicking a few different buttons to tell the system to create a change order. Until you click on these buttons, the change order fields, or the fields that are on the dispatched Purchase Order, are grayed out and cannot be changed.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Use
- ⇒ Purchase Order
- ⇒ Lines

The Update/Display Purchase Order dialog box displays.

Unit	PO	PO Date	Status	ShortName	Vendor	Name
------	----	---------	--------	-----------	--------	------

How do I Create a Change Order?





The business unit of LBNL will default.

Enter the Purchase Order number of the dispatch PO that requires the change order.

Click **OK**.

Lin	Item	Item Description	UO	PO Qty	Amount	Recycle Cd
1		PO #6512761- Testing f	EA	9.00	3689.00	US

Creating Line Changes

Use the **Line Details**  button to access the **Create Line Change**  button.

Amount: 3,689.79 USD Document Base: 3,689.79 USD

Category: **COMPC** Computer, CPU Status: Active

Contract: **LBNL**

RFQ ID:

Vendor Item ID:

Vndr Catlg:

Mfg ID:

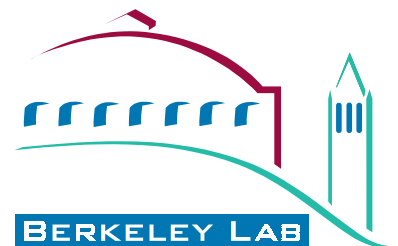
Price Qty: **Schedule** Price Date: **PO**

☐ Withholding ☐ Stockless

☒ Receiving Required


☐ Inspect

How do I Create a Change Order?




By clicking the **Create Line Change** button you will return to the **Purchase Order Line** panel and will be able to edit line items (i.e. Item Number, Item Description, UOM, and PO Quantity).

Processing Schedule Changes

Access the Schedule panel, click the “Fetch” button to open the schedule lines. Click on the Schedule Details  button.

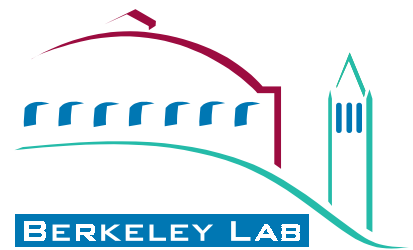
A screenshot of a software window titled "Details for Schedule 1 -- GODZILLA-001". The window contains various fields for purchase order details. At the top, it shows "PO #6512761 - Testing for Lauretta". Below this are fields for "Amount: 2611.55 USD", "Doc. Base: 2611.55 USD", and "Status: Active". There are checkboxes for "Custom Price - No Override" (checked) and "No Charge" (unchecked). The "Original Promise Date" is "05/13/2002" and "Matching" is set to "Full Match". "Freight Trm" is "DEST_VENPD" and "Ship Via" is "FEDEX". "Match Status PO" is "Matched". At the bottom, there is a table with columns: GL Unit, Account, Fund, DeptID, MARS, B +R, Bdgt Pd, Proj/Gr, Projects, and Location. The table contains one row with values: LBNL, 614010, WA, NE, OPEXP, KJ0101010, 619701, Projects, 937-0302. A blue checkmark icon in the top right corner of the window is circled, and an arrow points from it to the "Create Change Order" button in the text below.

GL Unit	Account	Fund	DeptID	MARS	B +R	Bdgt Pd	Proj/Gr	Projects	Location
LBNL	614010	WA	NE	OPEXP	KJ0101010	619701	Projects	937-0302	

Use the Schedule Details panel to access the Create Change Order  button.

By clicking the **Create Line Change** button, you will return to the **Purchase Order Schedule** panel and will enable you to change purchase order fields at the schedule and distribution level (i.e. Due Date, Ship To, PO Qty, Price, and Amount).

How do I Create a Change Order?



Step 2: Change Order History

You can access and review a history of the change orders for specific Purchase Orders. For each change order, you can review individual header, line, and schedule changes made to a purchase order since its initial dispatch. On each of these panels, you can scroll backwards from the most current version of the header, line, or schedule to the information originally dispatched.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Inquire
- ⇒ Change History

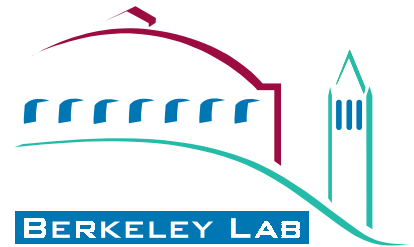
The Update/Display Change Order History dialog box displays.

Unit	PO	PO Date	PO Ref	ShortName	Vendor	Name
------	----	---------	--------	-----------	--------	------

The business unit of LBNL will default, click on the Search button and select the specific purchase order you want to view the change order history.

Click **OK**.

How do I Create a Change Order?



Header Changes

From this panel you will be able to view the various changes within the header panel.

Manage Purchase Orders - Inquire - Change History

File Edit View Go Favorites Use Process Inquire Report Help

Header Changes | Line Changes | Ship Changes

Unit: LBNL PO: 6512761

Vendor: 0000000025 Godzilla Demolition

ORIGINAL HEADER

PO Status:

PO Ref:

Payment Terms ID:

Buyer:

Currency Code:

Rate Type:

Billing Location:

Vendor Contact:

☐ Tax Exempt

Header Changes | Update/Display

Line Changes

On this panel you will begin to see changes that were made to the purchase order. Using the scroll bar you can access what changes were made.

Manage Purchase Orders - Inquire - Change History

File Edit View Go Favorites Use Process Inquire Report Help

Header Changes | Line Changes | Ship Changes

Unit: LBNL Vendor: 0000000025 Godzilla Demolition

PO: 6512761 Line: 1 PO #6512761- Testing for Lauretta

Chng Seq: 1 Change Order: 1

Item ID:

Item Description:

Unit of Measure:

Vendor Item ID:

Vndr Catlg:

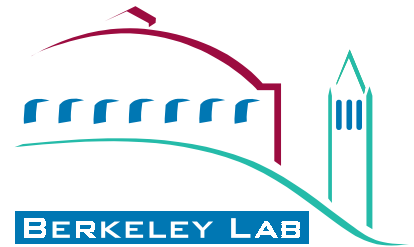
Manufacturer ID:

Contract: Line:

RFQ ID: Line Nbr:

Line Changes | Update/Display

How do I Create a Change Order?



Ship Changes

On this panel you will see from the example that the Unit Price was changed creating the Change Order.

Unit: LBNL Vendor: 0000000025 Godzilla Demolition

Current Item Details

PO: 6512761 Line: 1 Sched Num: 1

Item ID: Item: PO #6512761- Testing for Lauretta

Due Date: 05/13/2002 Original Schedule

PO Qty: 1.0000

Price: 2,611.55000 Amount: 2,611.55

Ship To: 069-0150 RECEIVING/SHIPPING

Freight Trm: DEST_VENPD DESTINATION VENDOR PAYS FRT

Ship Via: FEDEX FEDEX

Ship Changes Update/Display

Original Unit Price

Unit: LBNL Vendor: 0000000025 Godzilla Demolition

Current Item Details

PO: 6512761 Line: 1 Sched Num: 1

Item ID: Item: PO #6512761- Testing for Lauretta

Chng Seq: 1 Change Order: 1

Due Date:

PO Qty:

Price: 2,620.00000 Amount: 2,620.00

Ship To:

Freight Trm:

Ship Via:

Ship Changes Update/Display

The new Unit Price.
This change created the "Change Order".